

LEASING SPECIAL NEEDS HOUSING

Understanding the Roles and Responsibilities

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Roles and Responsibility:

- Property Manager
- Case Manager
- Residents/Applicants
- Property Management

All have different expectations regarding housing.

Relationships:

Today' session will evaluate the relationship between all parties.

Purpose of Housing:

In special needs housing it is important that the purpose on the property and targeted population be defined before marketing efforts commence.

Regulatory Restrictions

Most regulatory agencies require outreach to begin at least 90 days prior to the anticipated opening date. In order to be prepared and able to commence marketing efforts at this time, all involved parties should begin to meet six months before the anticipated certificate of occupancy date.

Policies to Establish

- ❑ Resident Selection Criteria
- ❑ Marketing Plan (least likely to apply)
- ❑ Application Process
- ❑ Resident's Expectations
- ❑ House Rules

Resident Selection Criteria:

- ❑ Defines resident population
- ❑ Details programmatic restrictions
- ❑ Establishes occupancy standards
- ❑ Defines rent/income/ restrictions
- ❑ Establishes eligibility requirements
- ❑ Defines grounds for denial:
 - Criminal
 - Credit
 - Too much/little income
- ❑ Appeal/accommodation process

Marketing Plan:

- ❑ Defines the application process
- ❑ Identifies where and how property will be marketed
- ❑ Calendars critical events
- ❑ Determines when and how will applications be given out
- ❑ Provides a timeline for application process
- ❑ Spells out all programmatic compliance requirements
- ❑ Summarizes income qualification requirements

Two Major Tiers of Eligibility:

1. Programmatic Compliance

Usually determines through Case Manager, certified medical providers, and other professional (HIPA sensitive information).

2. Income and other Qualification Requirements

Usually determined by property management and third parties.

Programmatic Compliance:

Does the applicant meet the intended use and requirements for the property?

Qualifications may include:

- Homelessness (chronic homeless or homeless)
- Disability status
- MHSA eligibility (eligible and actively receiving services from DMH)
- Ability to live independently (with or without accommodation or case management services)
- Meet terms of defined Resident Selection

Income Qualification:

Most affordable housing/special need communities are financed with many different sources. Each of these funding sources comes with a layer of Regulatory restrictions defining terms of occupancy.

- Income may not exceed a certain AMI
- Applicant can not be a full time student (certain exceptions apply)
- Applicant must meet criminal and credit background requirements
- Applicant may be subject to prior landlord references

Tax Credits:

The Low Income Housing Tax Credit Program (LIHTC) is a funding mechanism utilized in most affordable housing developments.

LIHTC compliance is monitored by the State for the IRS and has a very specific and compliance income qualification process.

LIHTC units are inspected for habitability and compliance every three years and owner is subject to harsh financial penalties if full compliance is not maintained.

Third Party Verifications from all Income Sources:

Income sources eligibility is determined at the time of move in.

Requirements include:

- Photo Identification
- Social Security number (or ID number)
- Third party verifications
- 3 months paycheck stubs
- 6 months banks statements
- SSI Award Letters
- Verification of Student Status

Roles of Case Management in Application Process:

- ❑ Case Manager is usually the best person to assess whether the applicant meets terms of Resident Selection Criteria and will succeed in the new housing environment.
- ❑ Case Manager are often the point of contact (it is very hard to get in touch with homeless population).
- ❑ Case Manager should be ready to will with applicant to assist with application process.

Roles of the Property Management:

A Property Manager wears many hats

- ❑ Works with applicant and Case Manager throughout the applicant process
- ❑ Orients the resident with the property
- ❑ Enforces House Rules
 - Common good
 - Can not tolerate acts which threaten health and well being of others
- ❑ Works as a team with Case Manager
 - Often notices problems
 - Works together to ensure success
- ❑ Processes Reasonable Accommodations